

# ServCat Guidelines for Creating a Reference

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ServCat contains over 50 reference types. Each reference type requires specific metadata, so data entry steps will vary. Before creating a Reference, it is important that you confirm whether a Reference already exists in ServCat. This will prevent the creation of a duplicate Reference in ServCat.

## CREATE A REFERENCE USING A FORM

- From the top menu select **Create** => **References** => **Create a Reference**
- Select the reference type from the dropdown list (*Refer to the [ServCat help manual](#) if uncertain about the reference type*)
- Select **Next**

## Core Information Tab

The **Core** tab contains important information needed in a reference record. The number of fields and labels changes for each reference type. An asterisk indicates that a field is required. It is recommended that you populate as many fields as possible. This increases the discoverability of the Information Resource.\*

### Title

- Enter the title that appears on the “title page” (*Note: Information on the cover page is not always complete*)
- Do not omit or abbreviate words in the title
- Use sentence style capitalization (i.e., capitalize first word in a sentence) (*Note: Refer to [NRPC's Capitalization Guidelines](#) which can be found on the ServCat Help page*)
- If no title is known, construct a title, derive it from the Information Resource itself, and place brackets around it; e.g. [Baseline inventory data for Pea Island National Wildlife Refuge]. Then indicate in the **Notes** field that the title was constructed because an original title was not available
- If “Draft” is stamped on the cover, add this to the title and enclose in brackets. Please note that ‘working’ documents in draft form should not be entered into ServCat unless a final version of the document was never created
- If draft was not on the cover but mentioned in the document, again, add draft to the title and enclose it in brackets; e.g. Conservation agreement for the tricolored heron [Draft]

### Date Issued/Produced

- Use the date the Information Resource was issued

*\*Information resource refers to the item being entered into ServCat. It could be a dataset, a document, geospatial data, a multimedia resource, a project, or a web resource.*

### Contacts (Authors)

- Click **Add New Contact**
- Select contact type (Author, Editor, Producer) from the dropdown list
  - Choose **Individual** or **Business**
  - Click on **Save Contact** button

### Abstract/Full Description

- Provide a summary of the Information Resource's content; enter up to 4,000 characters.

### Size Definition

- Click on **Add New Size** button
- Click on **Label**, select from the dropdown list
- Click on **Value**, enter a value
- Click on **Units**, select from the dropdown list

### Information Resource Evaluation Tab

The **Information Resource Evaluation** tab evaluates key qualities of the information resource. This evaluation is strictly for the Information Resource and not for the Reference. DO NOT embed sensitive or proprietary information into the reference itself. This evaluation determines who can see the Reference and download the associated digital file. The tab defaults to non-sensitive and non-proprietary; if this is not the case, enter the appropriate information.

### Sensitivity Evaluation

There are three sensitivity options for an Information Resource; non-sensitive, sensitive, and unknown.

- A **Non-sensitive** information resource contains no sensitive information.
- If **Sensitive** is selected, specify why the Information Resource is sensitive. An Information Resource may have a number of reasons it is sensitive. Select all that apply.
- Select **Unknown** if the Information Resource has not been evaluated and may contain sensitive information.

### Information Evaluation

There are also three proprietary options under the **Information Evaluation** tab; non-proprietary, proprietary and unknown.

- **Non-proprietary**: not protected by trademark, patent, or copyright.
- **Proprietary**: protected by trademark, patent, or copyright; made or produced/distributed by one having exclusive rights (e.g. journal article, thesis, proceedings paper).
- Select **Unknown** if the Information Resource has not been evaluated and may contain proprietary information.

### Quality Evaluation

There are five options to choose from under the **Information Resource Quality Evaluation** section; **High**, **Medium**, **Low**, **Poor**, and **Unknown**. This provides you an opportunity to select the quality of the Information Resource, if known.

## Organizations and Geographical Tab

The **Organization and Geographical** tab contains tools to link a reference record to a Fish and Wildlife organization and/or geographic area. An Information Resource is linked when it contains specific information about the Organization. By defining a link, you can easily search and discover information specific to an Organization. An Information Resource can be linked to one or more Organizations.

### To link an Organization:

- Keep the default box checked to **Automatically Add Bounding Box**
- Choose the Organization(s) that relate to the Information Resource
- If one or more of the Organizations discussed in the Information Resource have changed names or been absorbed by another Organization, select the current name for the Organization. Note that the organization list is based off of the current Corporate Master Table. Be sure to include the name(s) of the Organization(s) as written in the Information Resource in another metadata field such as the title, abstract, or keywords.
- Click **Add** (*Note: If you delete an Organization, you also have to delete the bounding box*)

### To add a custom bounding box:

- Click the **Add Bounding Box** button
- Select the **Draw Bounding Box** tool on the mapper (a white plus sign inside a black square)
- Sketch the bounding area on the map
- Assign a name to the new bounding area
- Click **Save**

## Keywords Tab

ServCat supports three types of keywords: subject-category keywords, free-form keywords, and biological taxa. Consider the following when assigning keywords:

- User needs: Assign keywords that assist users in identifying the Information Resource
- Current usage: User's needs are best met if keywords reflect current usage in regard to terminology
- Consistency: Maintain consistency when selecting a keyword. Use terms from the [ServCat Keywords List](#) which can be found on the ServCat Help page.
- The more keywords assigned, the greater the probability the user is erroneously led to an Information Resource
- Too few keywords can have an equally adverse effect; the user may miss an item because a keyword was not assigned
- A multiple-word phrase can be used (e.g. Habitat Selection or Wildlife Monitoring)
- Words and phrases contained within the **Core** tab (Title, Abstract etc.) do NOT need to be repeated as keywords.
- Assign 5-10 keywords that best describe the overall content of the item

### Subject-category Keywords

- Begin typing a term in the dropdown box or scroll through the list to see what's available. Select keywords that are relevant to your Information Resource.

- Click **Add Subject Category** to continue adding subject-category keywords

### Freeform Keywords

- Keywords should be comma-delimited (*spaces are not required after a comma*)
- Keywords should be Proper Case, meaning that the first letter of each word should be capitalized (e.g. Wildlife Refuges)
- Common words, including 'and' and 'or' are generally lower case (e.g. Boats and Boating)
- Species names are represented in lower case (e.g. Quercus gambellii). See biological taxa section below.
- Do not use Organization name or reference type as a keyword
- Acronyms should be capitalized (e.g. CCP)

### Biological Taxa

ServCat treats Biological Taxa like it handles keywords. It is another way to communicate the content of the Information Resource and also facilitate discovery. Biological Taxa should be linked to a Reference if the taxon is mentioned somewhere in the body of the text or if the reference contains a record for the specific taxon. (*Note: When searching for your species records, you must use the scientific name.*)

- Select the **Add Biological Taxa** button
- Type in the taxon, then select it from the dropdown list
- Click **Next**
- When appropriate, check the box next to an Organization name to link that taxon to the Organization
- Select **Finish and Close**

### Permissions Tab

The last tab in the form is the **Permissions** tab. By default, the record creator is the owner. In this tab, you can add and remove Reference Owners and Viewers. Reference **Owners** have permission to edit the Reference and download all digital attachments for the Reference. A **Viewer** can view a Reference or download digital attachments but cannot edit a Reference. It is recommended that Reference Owners designate at least one other Reference Owner to ensure that records are not orphaned. Also, if a Reference contains sensitive information, the Reference Owner can restrict access to specific FWS users.

- Click the **Add Owner/Viewer** button (*Note: "Owner" is the default when selecting owners*)
- Type in the Active Directory name of the person you want to add and select their name from the dropdown list (e.g. [Todd.Sutherland@fws.gov](mailto:Todd.Sutherland@fws.gov))
- If you want this person to be a Viewer, not an Owner, click **Owner** to the right of the user's name and select **Viewer** from the dropdown list.
- Add additional owners/viewers as needed

### Saving a Record

There are four options for saving a Reference which can be found in the lower, right-hand corner: **Draft**, **Draft (Continue Edit)**, **Active**, or **Cancel**.

- **Draft:** If the record is incomplete (e.g. fields not validated or metadata is missing) save the Reference as a Draft. A Draft reference will only be visible to the record owner.
- **Draft (Continue Edit):** This option allows you to save the References as a Draft and continue making edits.
- **Active:** If all the fields have been completed and validated, you can activate the record.
- **Cancel:** Selecting **Cancel** closes the form. Data entered will not be saved.

### Adding a Holding Location

It is important that an Information Resource includes the associated digital file. This will promote information sharing and collaboration between Organizations.

### Uploading Files

- Select **Add Digital File** from the Options Banner of the Reference's profile
- In the **Upload New Files** panel click on the **Select Files** button
- Browse to your document
- Click the **Upload** button
- When the upload is complete, click **Active** to save the holding

## CREATE A REFERENCE BY CLONING

If an existing Reference has attributes very similar to a new one to create, then use the **Clone** tool. When an existing Reference is cloned, the new Reference is identical to the original except for the following:

- You are the Owner
- The Reference lifecycle state is **Draft**
- Any Approved Reference Unit Links will be set to **Pending**
- There are no Holding Locations
- There are no comments
- There is no Source XML
- Most related References are not preserved
  - Project bundles are ignored (i.e., Was-Created-By link)
  - Child References are ignored (i.e., Is-Part-Of link). For example, cloning a Book does not automatically create new book chapters. However, when cloning a book, the link to the book series will be preserved.

### To clone a reference:

- Select **Clone** from the Options Banner of the Reference's profile
- Click **OK** to continue
- Modify the metadata as needed (e.g. contacts, date fields, pagination)
- Save the new record and create a holding location

## CREATE A REFERENCE BY UPLOADING XML METADATA

One or more local XML metadata records can be uploaded to create new References in lieu of creating one

in the online form. The benefit of using this process is that you don't have to recreate attributes that are common to the two formats.

- From the top menu select **Create** => **References** => **Create a Reference from XML**
- Select a Reference Type option (*Note: Only datasets, aerial photographs, satellite images, and web services are supported.*)
- Click the **Select Files** button and navigate to the XML metadata
- Select the **Upload** button
- Select the **Edit** option to evaluate the attributes imported from XML (*Note: Each tab should be viewed to confirm that all critical fields are complete and accurate*)
- Select the **Active** button (*Note: A copy of the original XML can be viewed by selecting **View Source XML** in the Options Banner; also, an External Holding Location is added to the record. This location reflects the path to where the digital file can be downloaded.*)